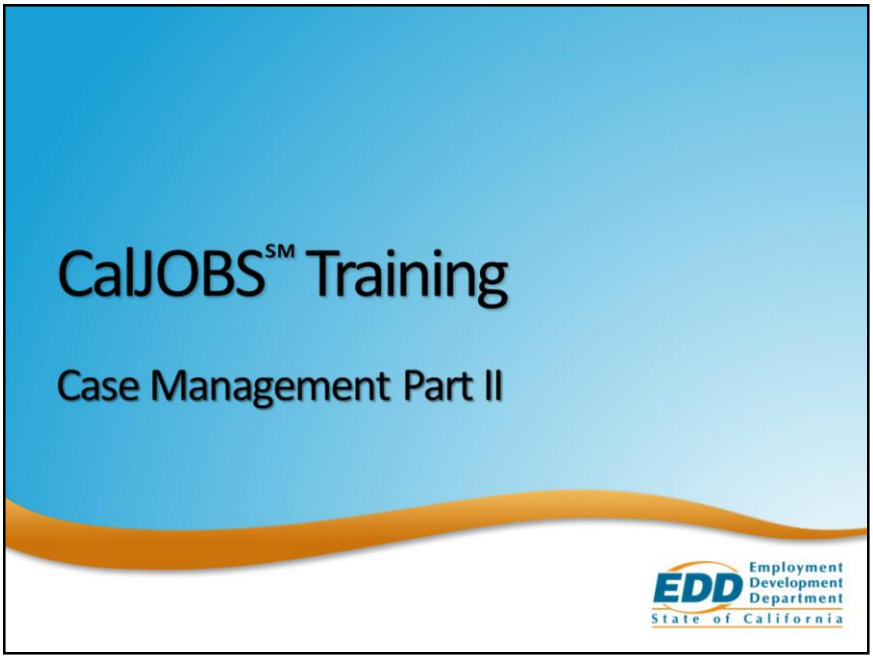
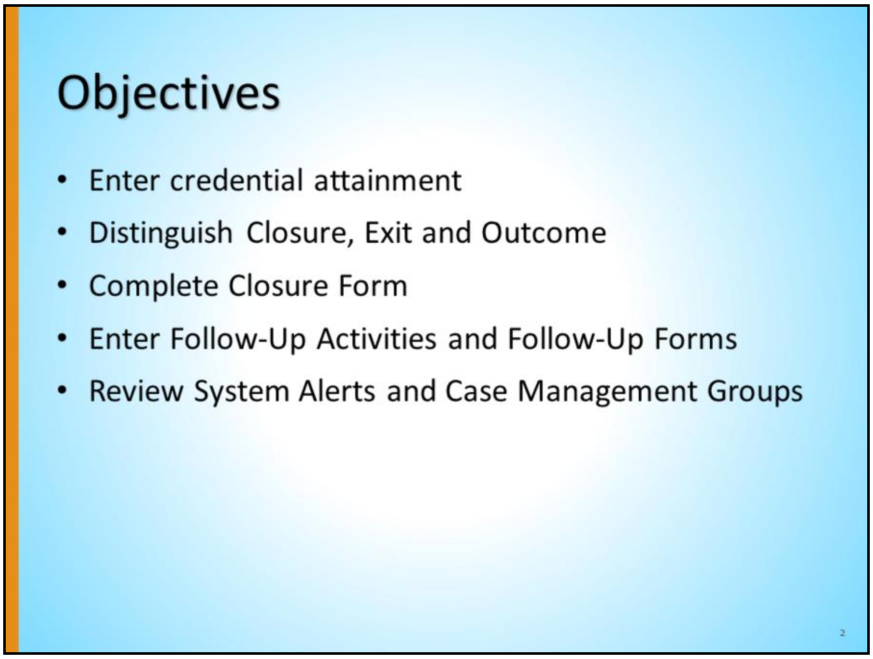
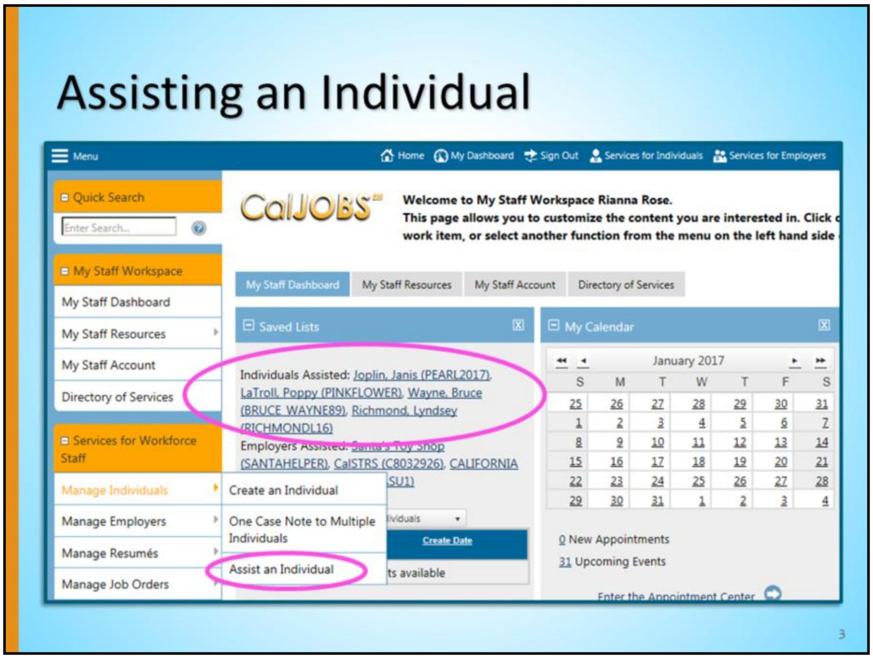


Welcome to CalJOBS Training! In this training, we will learn more about the Case Management features available in CalJOBS.



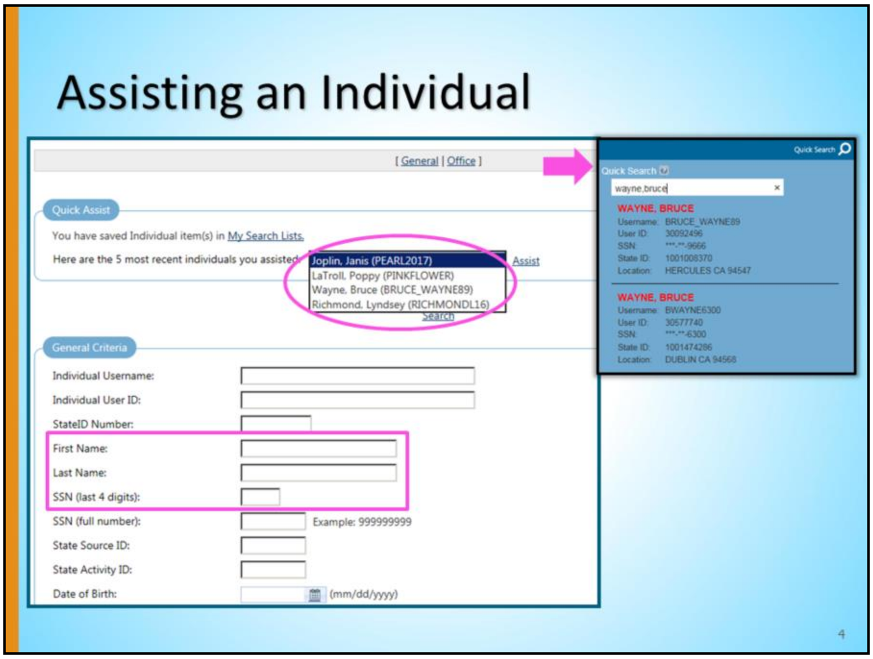
In this training, we will:

- Enter credential attainment
- Distinguish Closure, Exit, and Outcome
- Complete Closure form
- Enter Follow-Up Activities and Follow-Up Forms
- Review System Alerts and Case Management Groups

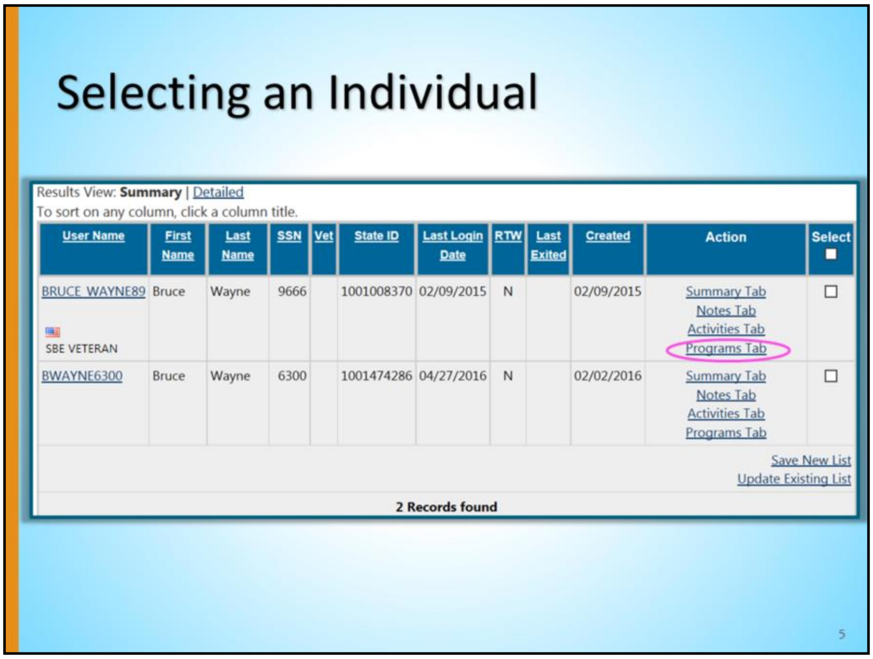


After logging into the system, the first page you will see is **My Staff Dashboard**. On the left navigation menu you will see a gold tab called **Services for Workforce Staff**. In that tab, hover over **Manage Individuals** and select **Assist an Individual** from the fly-out menu, as shown in the lower circle.

Or, if you have previously assisted individuals, you can choose from the recently assisted list of individuals in the **Saved Lists** widget, shown in the top circle.

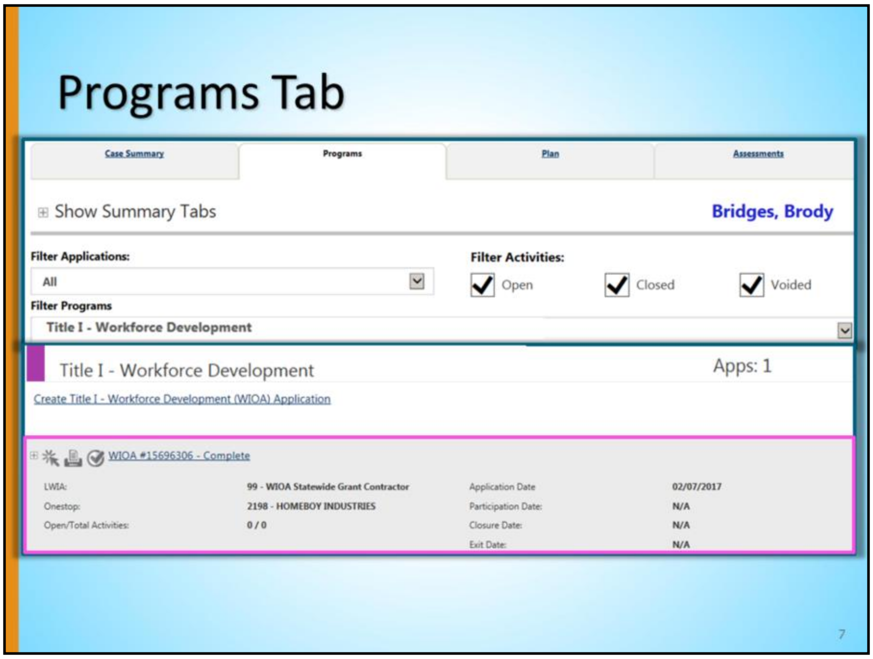


There are different search options including Quick Assist and General Criteria. Also, there is a Quick Search at the top right corner of every page.
It is recommended to search by full name and the last 4 digits of the individual's Social Security Number. This will help eliminate the likelihood of opening the wrong person's profile.



Still, your search results may give you more than one individual user. Find the individual you would like to create a WIOA application for, and select the "Programs Tab" link in the far right Action column.

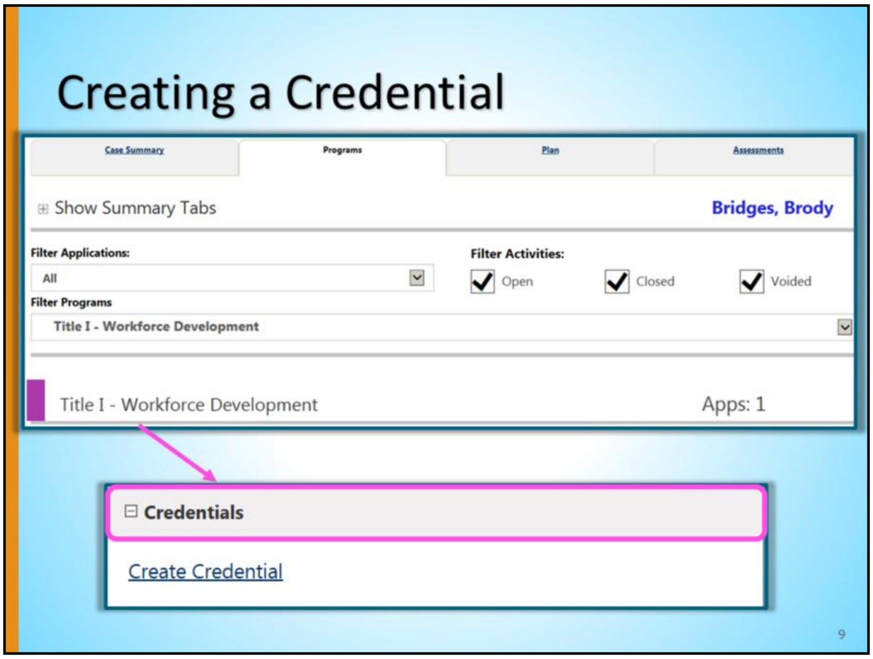
Next, you may see a **Right to Work Verification** screen. Staff can enter the information, or bypass by selecting the Remind me later link at the bottom of the page.



After the Right to Work verification reminder, the Programs tab will appear. You may click anywhere in the light gray box (outlined in pink) to expand the rest of the Title I program application sections.

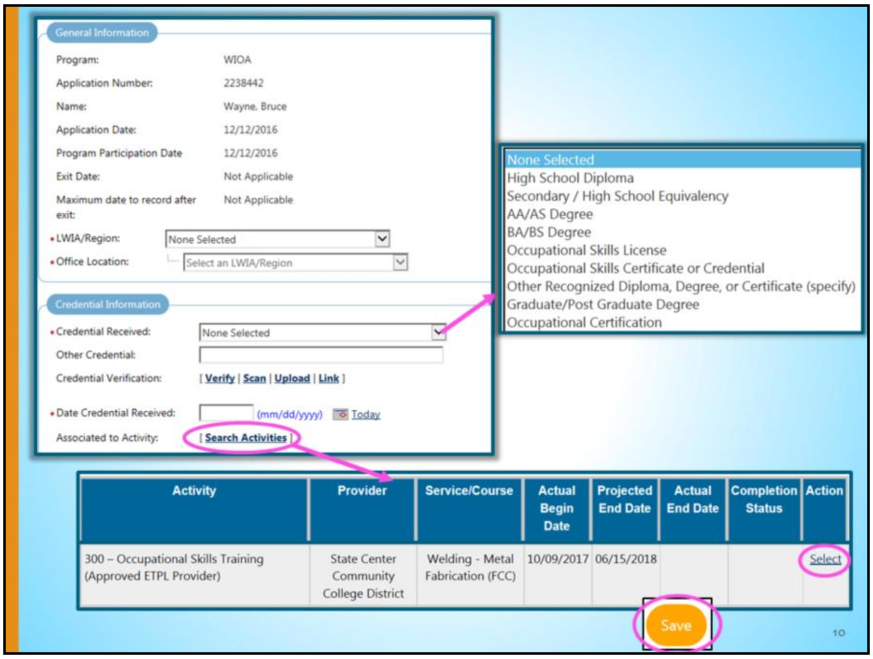
Credential Attainment in CalJOBS

8



You will enter credential attainment information in the **Credentials** ribbon. To create a credential, expand the gray ribbon called **Credentials.**

Click the "Create Credentials" link.



Under the **General Information** section, choose your LWIA/Region, then choose your organization from the **Office Location** drop down menu.

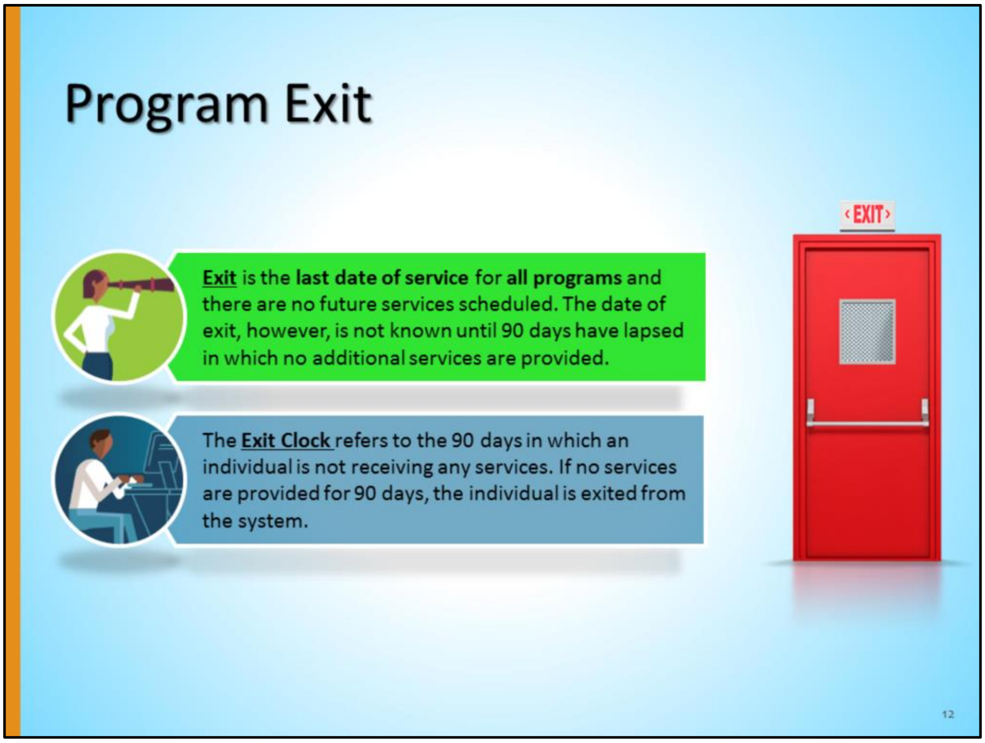
In the **Credential Information** section, select the appropriate credential attainment option from the **Credential Received** drop-down menu. The **Credential Verification** field is available for use if you would like verify the credential and upload documentation in CalJOBS. If the Verify link is not utilized, the statement "Copy containing in Case File" will result.

Next, complete the **Date Credential Received** field. Finally, although not marked with a red asterisk, it is required that you select the Search Activities link from the **Associated to Activity** field to associate an activity to this credential attainment. Click the Select link from the "Action" column for the appropriate activity code, and the information will populate into the **Associated to Activity** field.

To finish, select the "Save" button.

Program Closure, Exit, and Outcome

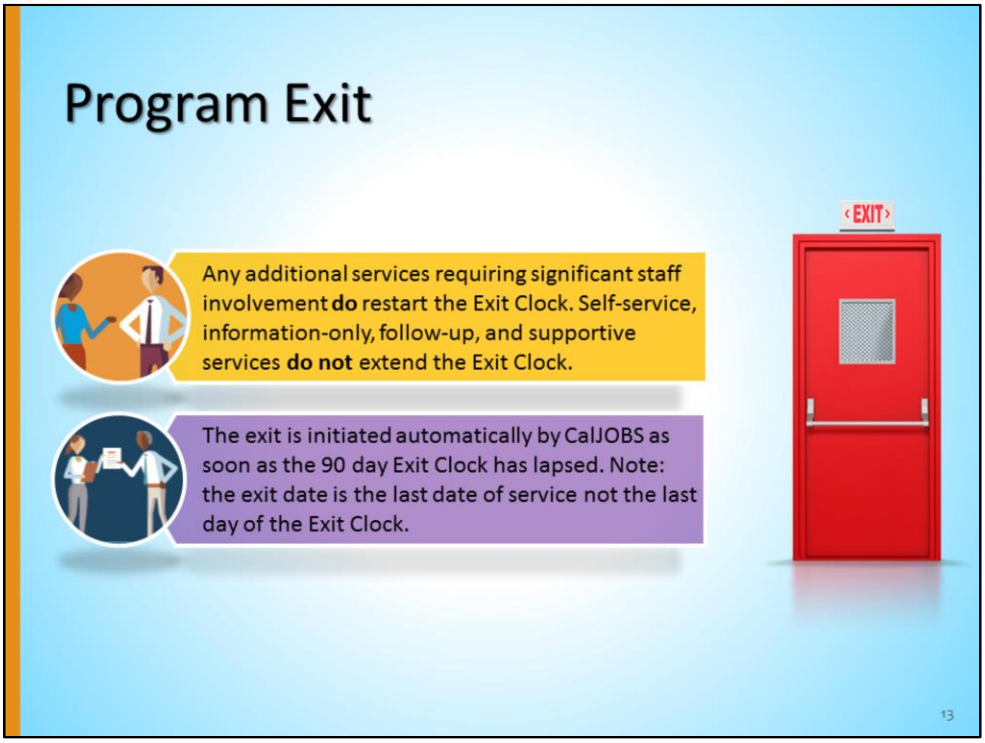
11



Program exit is an important concept for staff to understand. We will define exit and the exit clock.

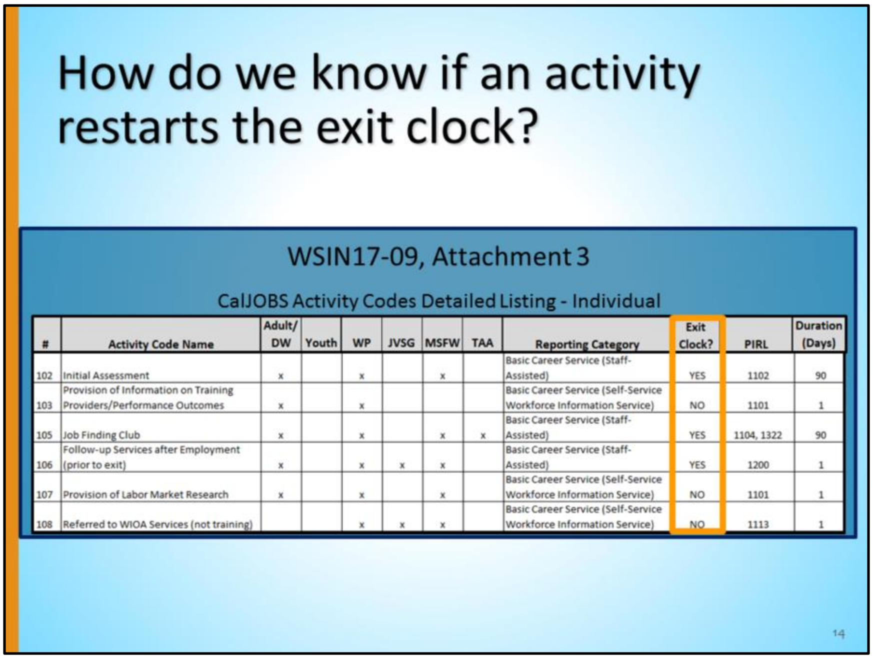
<u>**Exit**</u> is the **last date of service** for **all programs** and there are no future clock restarting services scheduled. The date of exit, however, is not known until 90 days have lapsed in which no additional services are provided.

The <u>**Exit Clock**</u> refers to the 90 days in which an individual is not receiving any services. If no services are provided for 90 days, the individual is exited from the system.



When it comes to services, any additional services requiring significant staff involvement **do** restart the Exit Clock. Self-service, information-only, follow-up, and supportive services **do not** extend the Exit Clock.

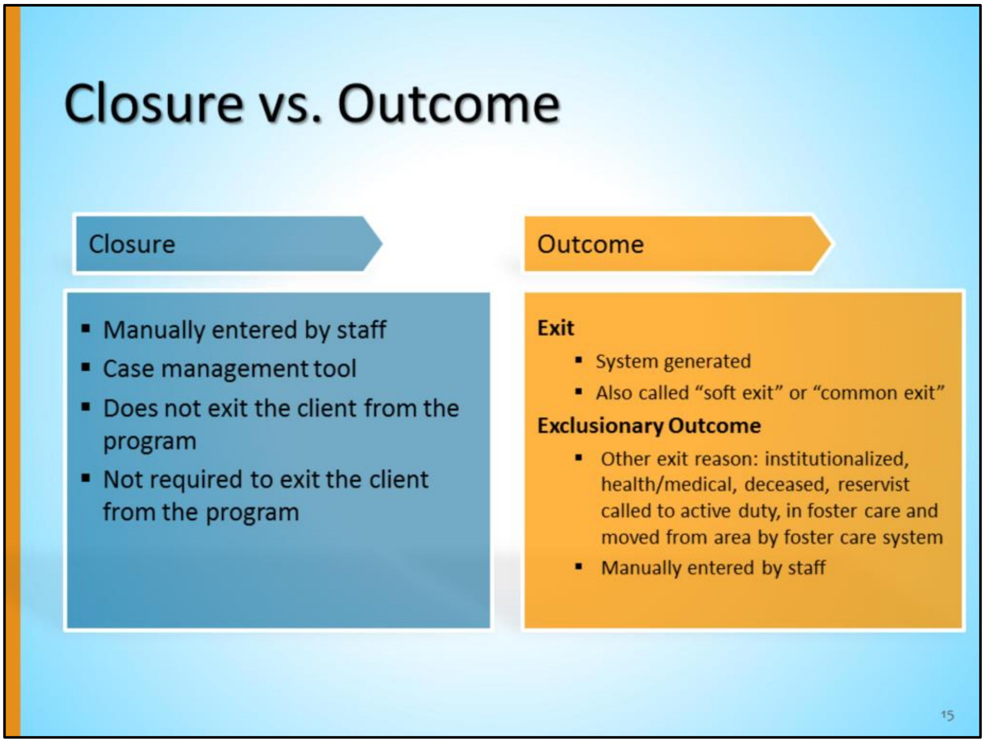
The exit is initiated automatically by CalJOBS as soon as the 90 day Exit Clock has lapsed. Note: the program exit date is applied *retroactivity* to the last service's actual end date. This means the exit date is the last date of service not the last day of the Exit Clock.



#	Activity Code Name	Adult/ DW	Youth	WP	JVSG	MSFW	TAA	Reporting Category	Exit Clock?	PIRL	Duration (Days)
102	Initial Assessment	x		x		x		Basic Career Service (Staff-Assisted)	YES	1102	90
103	Provision of Information on Training Providers/Performance Outcomes	x		x				Basic Career Service (Self-Service Workforce Information Service)	NO	1101	1
105	Job Finding Club	x		x		x	x	Basic Career Service (Staff-Assisted)	YES	1104, 1322	90
106	Follow-up Services after Employment (prior to exit)	x		x	x	x		Basic Career Service (Staff-Assisted)	YES	1200	1
107	Provision of Labor Market Research	x		x		x		Basic Career Service (Self-Service Workforce Information Service)	NO	1101	1
108	Referred to WIOA Services (not training)			x	x	x		Basic Career Service (Self-Service Workforce Information Service)	NO	1113	1

To learn if an activity code restarts the exit clock, refer to your Activity Codes listing found in the Workforce Services Information Notice 17-09.

Within attachment 3, there is a column titled “Exit Clock?” that indicates whether or not an activity restarts the exit clock. If the value is “Yes” and that service code is added to an individual’s program application in CalJOBS, the 90 day exit clock will be reset.



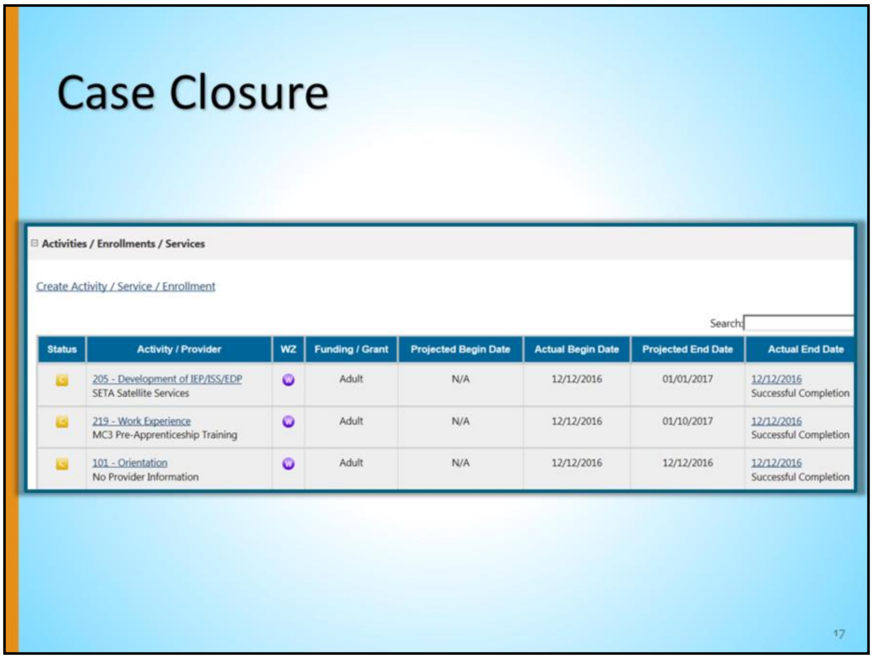
We covered how to create a closure in CalJOBS, but it is important to know that closure and exit/outcome are **not** the same thing.

Closure = closing a program. (Not to be confused with closing an activity). Closure is manually entered by staff, does not exit the client, and is not required for the client to exit.

Closing a program gives staff the ability to add follow-up activities, enter employment attainment information, and allows staff to run reports quicker.

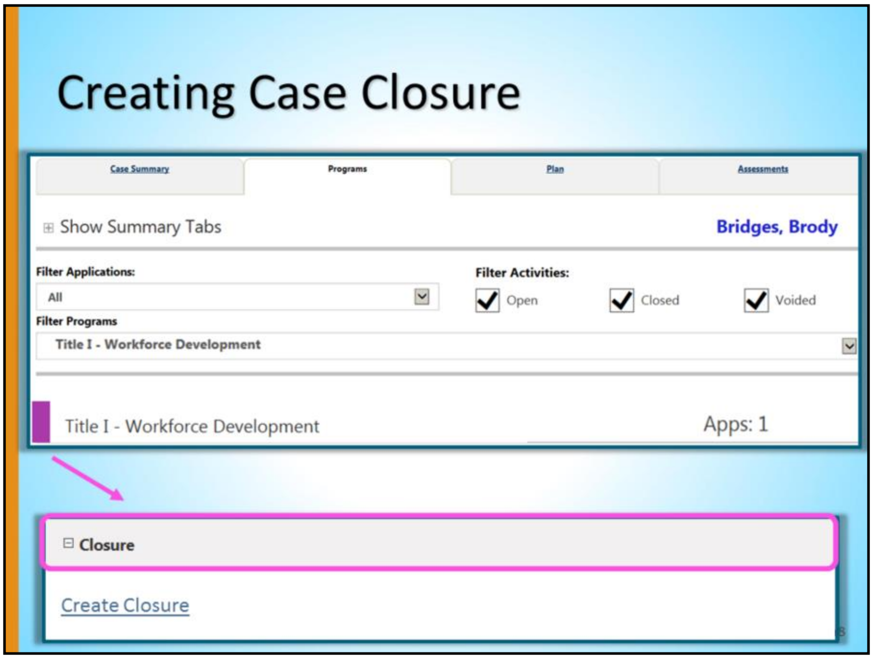
Exit/Outcome= system generated, occurs on last date of service, signaling that a participant is no longer in the program. Or, a client may exit based on an exclusionary outcome, which is very rare.

Closure Form



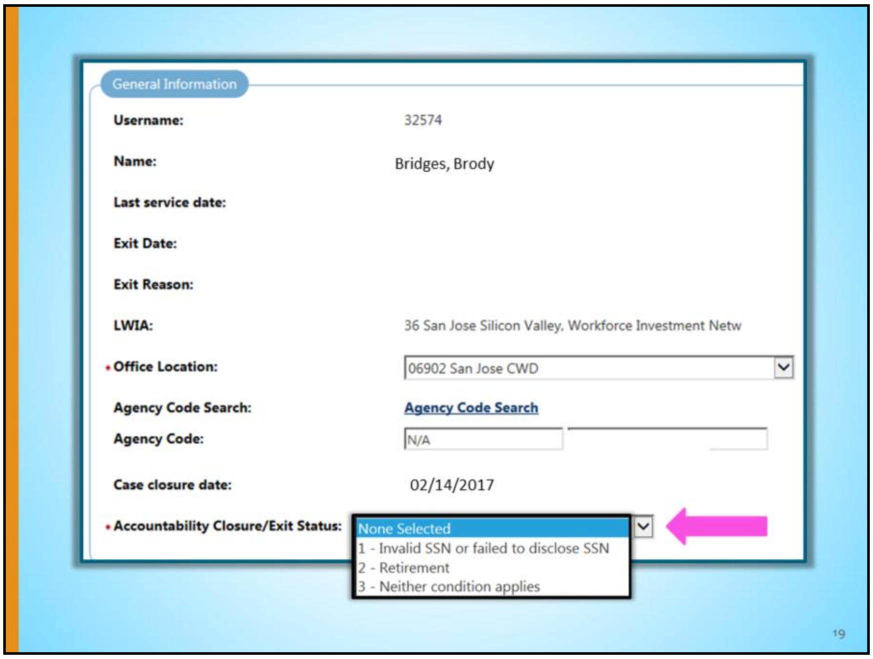
Entering information into the Closure ribbon for your program participants is highly recommended, as project outcome information is entered and gathered here.

After expanding the Title I Application, and expanding the **Activities/Services/Enrollments** ribbon, you will see the activities table. This table shows that all activities have been closed out. You cannot complete a closure, unless all activities are closed. Once all activities are closed, you can complete a closure.



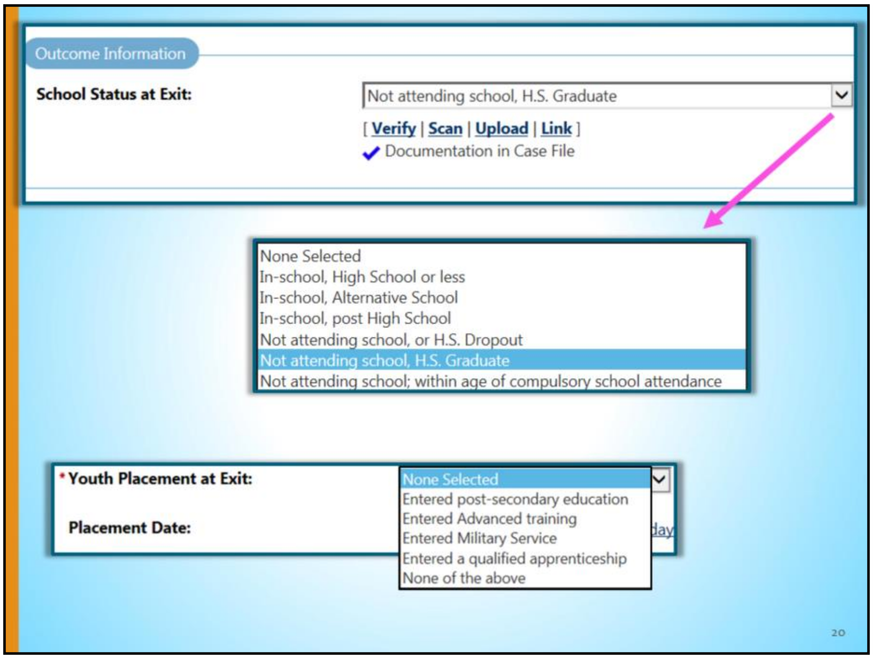
With the Title I Application expanded, click anywhere in the gray ribbon called **Closure** to expand it.

Click the "Create Closure" link.



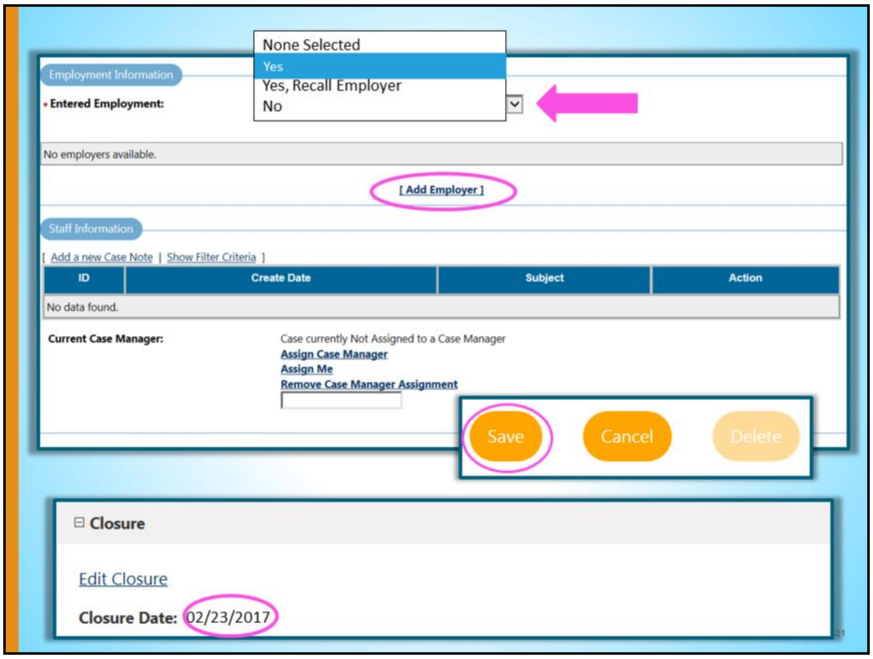
After selecting the "Create Closure" link, under **General Information** enter your **Office Location** if it is not prepopulated.

Choose the **Accountability Closure/Exit Status** by selecting the drop-down arrow. Options are shown on this slide. You will most likely choose option 3 – "Neither condition applies."



Scrolling down, under **Outcome Information**, select the appropriate **School Status at Exit** from the dropdown menu. Our example shows "Not attending school, H.S. Graduate."

If your individual is a Youth, you may have a **Youth Placement at Exit** field. If so, select the appropriate option from the dropdown.

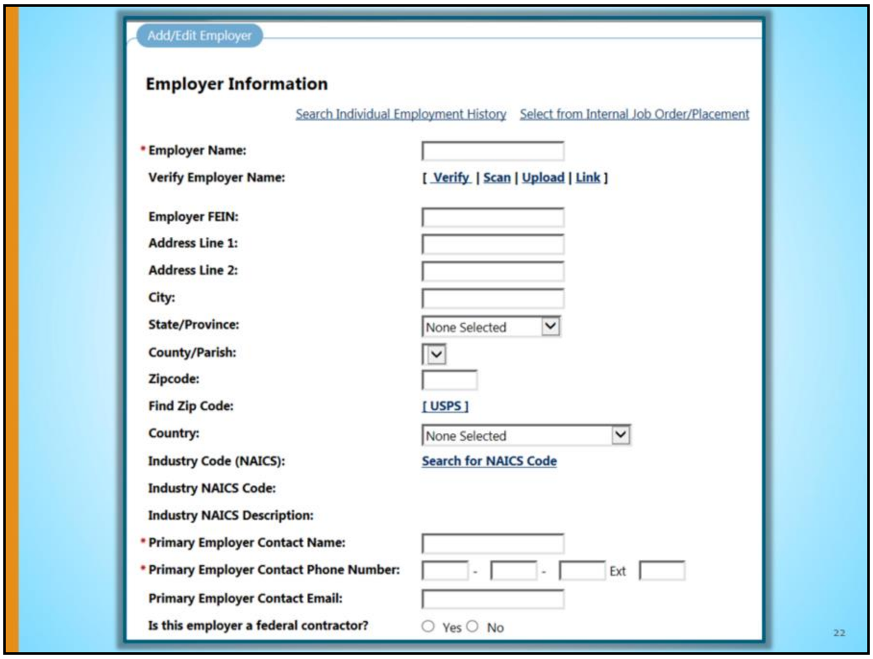


Finally, choose whether or not the individual entered employment in the **Employment Information** section.

If "Yes" is chosen, the employer information must be completed in the system by selecting the "Add Employer" link.

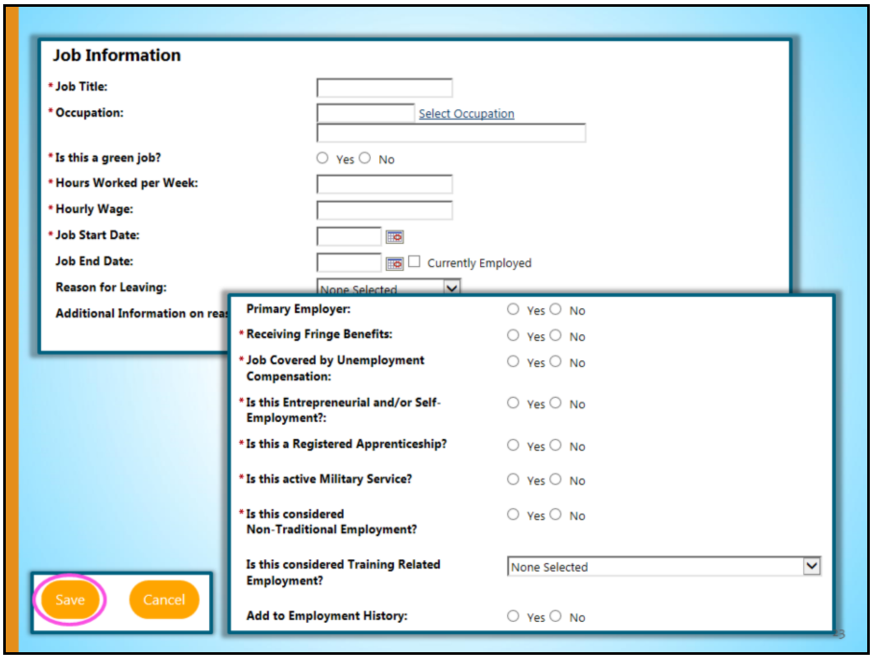
"Yes, Recall Employer" can be selected if the individual returns to work for a previous employer, and that employer has been captured in CalJOBS.

If "No" is chosen, complete the **Staff Information** if applicable. Select the "Save" button to generate a case closure. The case closure date will now appear within the **Closure** ribbon of the Title I Application.

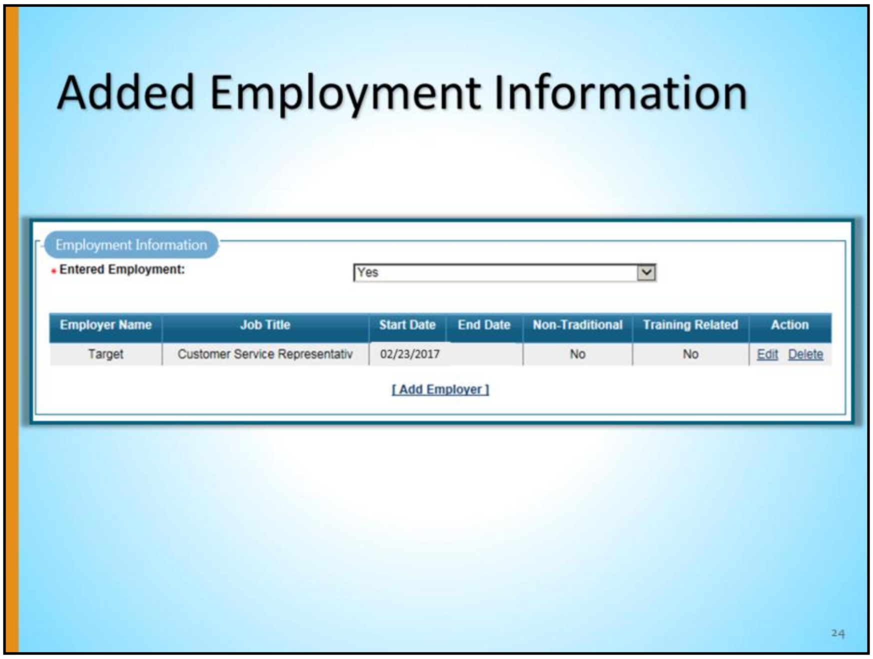


If you selected the "Add Employer" link (shown on the previous slide), please complete the required fields. When typing into the **Employer Name** field, the system may populate a drop-down of potential employers. For example, if you begin typing "Target", a list of possible Target locations will populate as options. If you select the employer from the drop-down, much of the information in the subsequent fields (address, NAICS Code, and contact number) will be entered with the appropriate information. You must ensure all required fields are complete before moving to the next section.

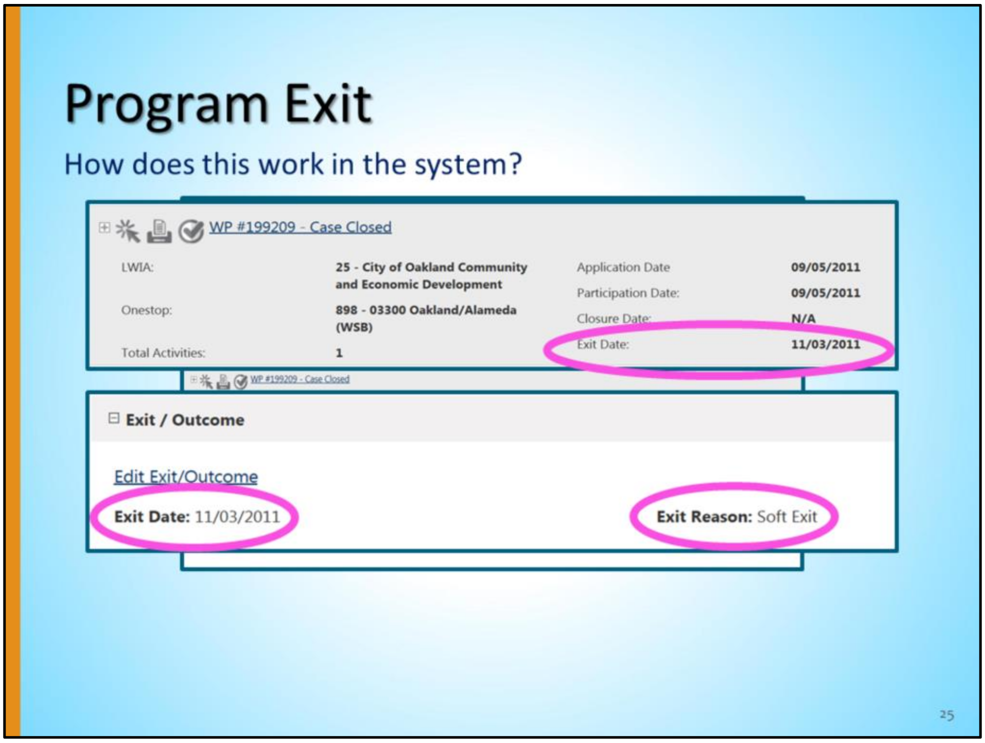
If you begin to type in an employer and the system does not populate options in the drop-down, you can still enter the employer's information manually.



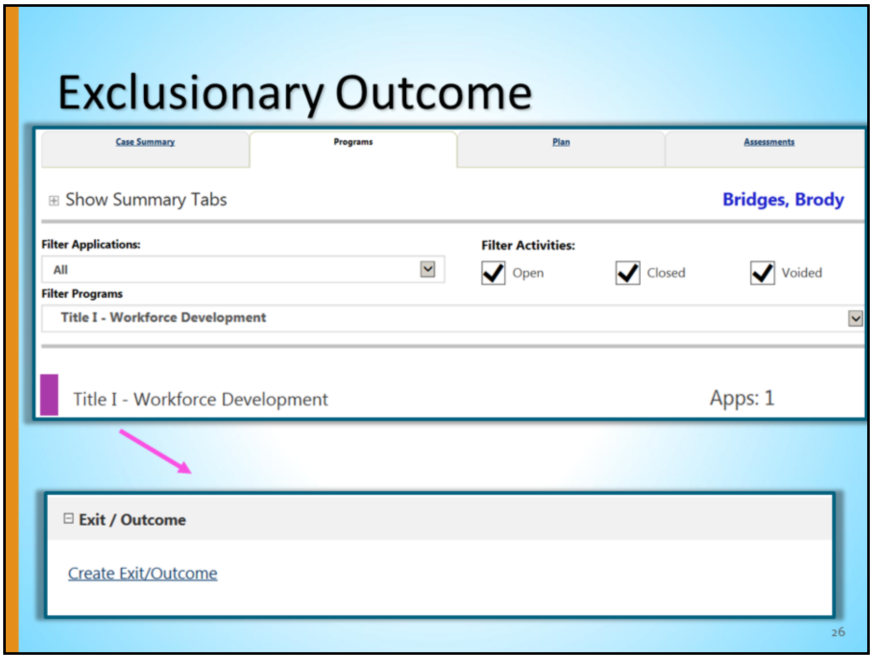
Continuing with the **Add/Edit Employer** section, enter all required **Job Information** fields. Select "Save" upon completion.



This table will populate in the case closure screen as a result of entering the employment information.



The system exits the participant when 90 days have passed since the last date of service across Title I, TAA, and Title III-WP applications. You will find the program exit information within the individual's Title I program application. You will notice a date in the **Exit Date** field in the top portion of their Title I application information, as well as dates and exit reason on the **Exit/Outcome** ribbon.

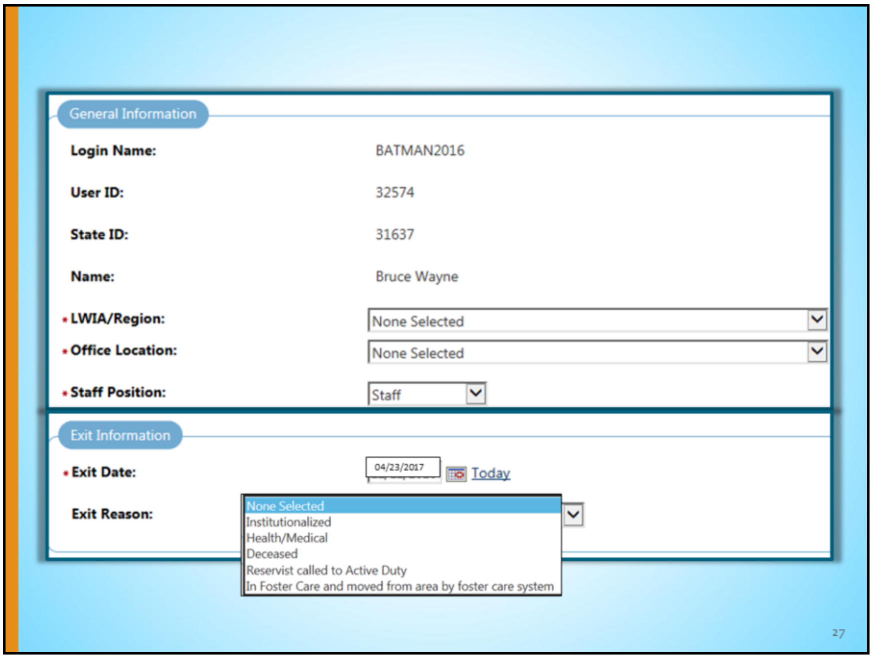


In limited circumstances, a staff member has the ability to tell the system, "I know for certain that this person is not coming back to receive more services". Instead of waiting the 90 days, the participant exits immediately. This is called an Exclusionary Outcome.

An Exclusionary Outcome is ONLY used when an individual cannot complete the program due to certain circumstances, such as death, significant health issues, or incarceration.

You would only use this option when there is documentation proving that the Exclusionary Outcome exists. Please be sure to consult with co-enrollment or open applications with other Local Areas prior to completing an Exclusionary Outcome.

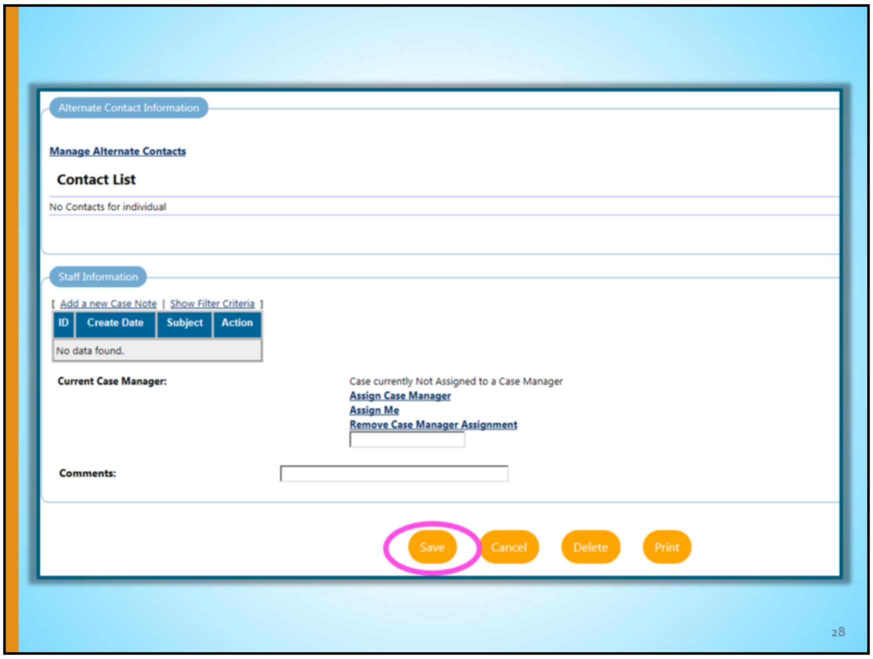
To complete an Exclusionary Outcome, select the "Create Exit/Outcome" link.



Choose your **LWIA/Region**, **Office Location,** and **Staff Position** from the drop down menus, if not already populated.

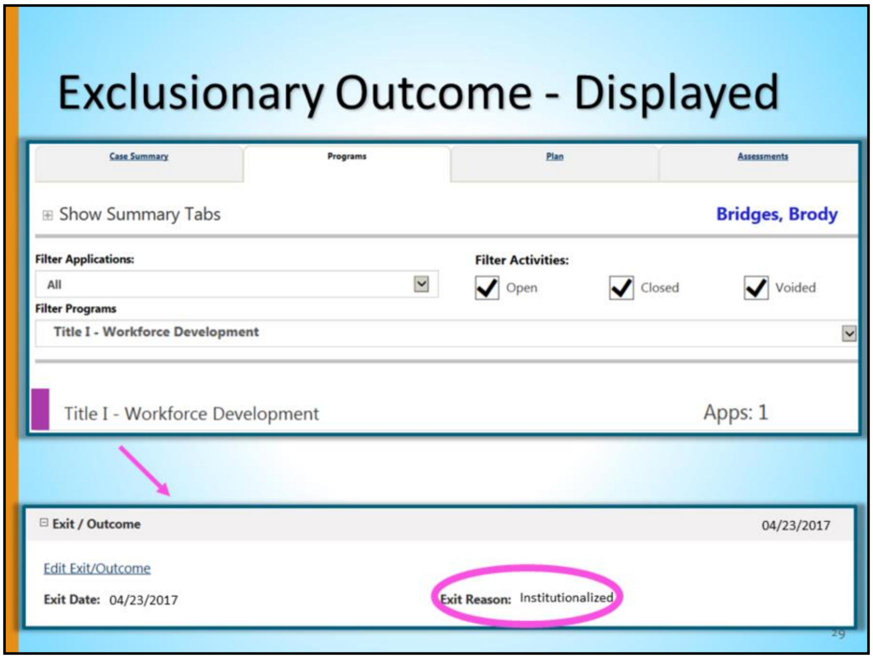
Under the **Exit Information** section, enter the **Exit Date** (last date the individual received a service).

Choose the exclusionary outcome reason from the **Exit Reason** drop down menu. Again, these are the only reasons an Exclusionary Outcome would be completed.



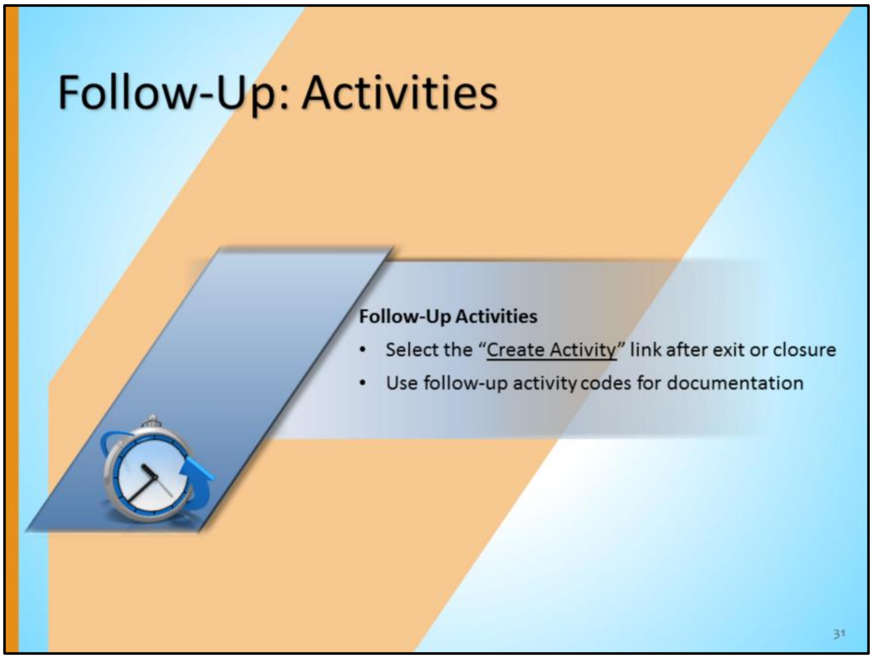
Complete the **Alternate Contact Information** and **Staff Information** sections, if desired.

Select the "Save" button.

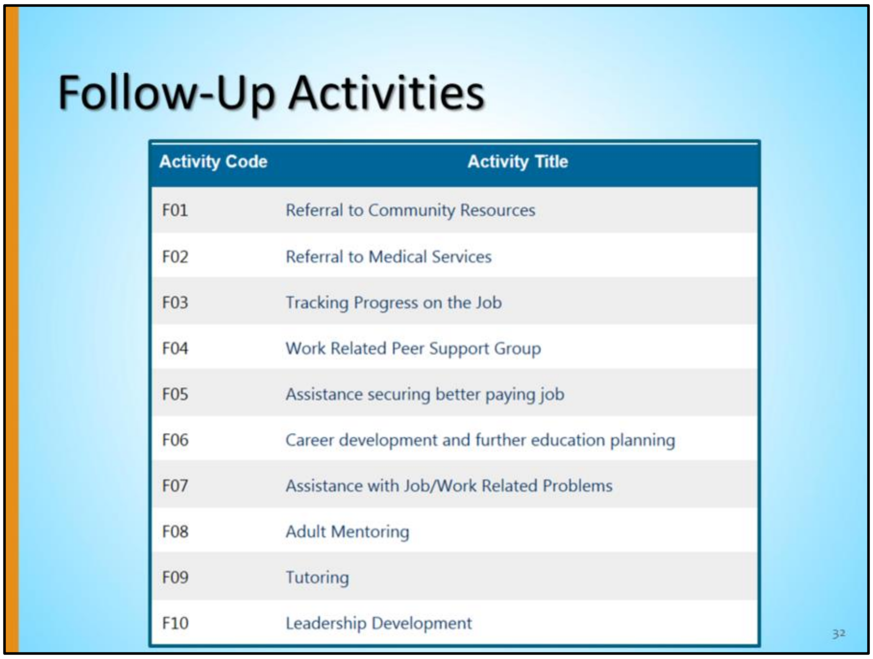


This is what the Exclusionary Outcome will look like once completed in the system.

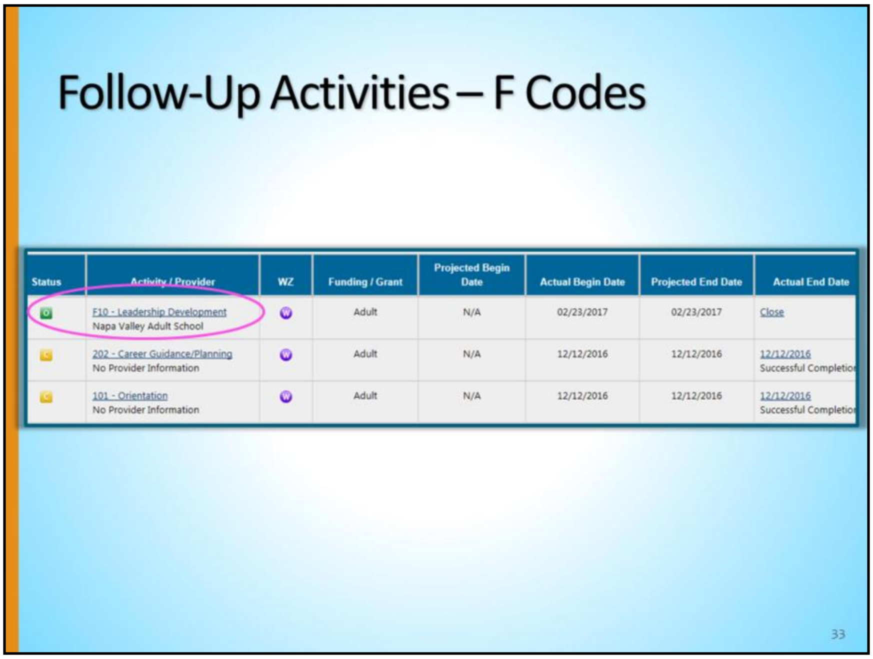
After a closure is created or when an individual exits the program, follow-up activities populate as options when adding an activity code.



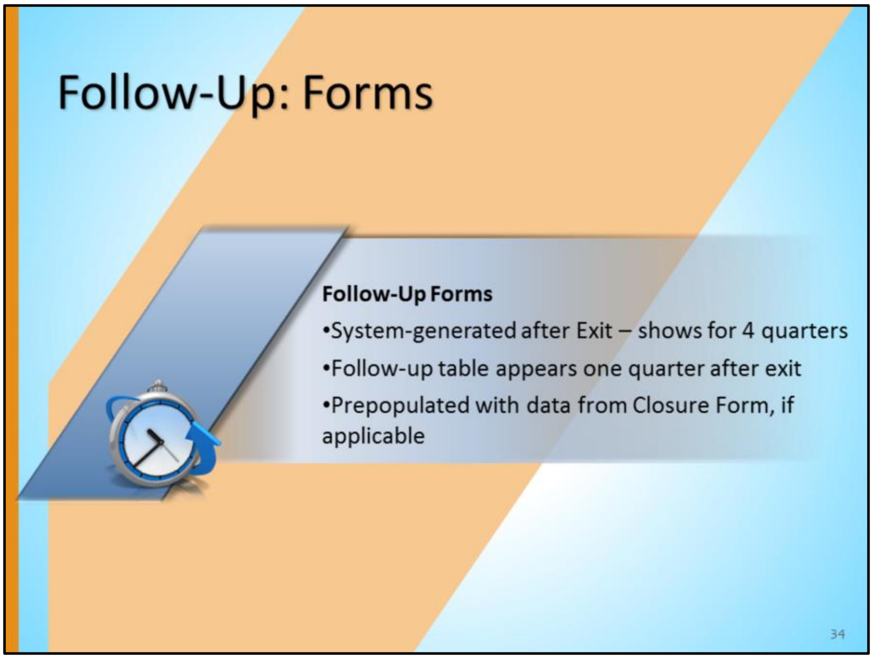
Follow–up activities can be created after exit or after creating closure, by selecting the "Create Activity/ Enrollment/ Service" link from the **Activities/Enrollments/Services** ribbon. Follow-up codes are used for documentation of the services you provide after closure or exit.



This is a list of possible follow-up codes you can enter into CalJOBS. These are know as F-codes because the activity codes to choose from all begin with the letter "F."

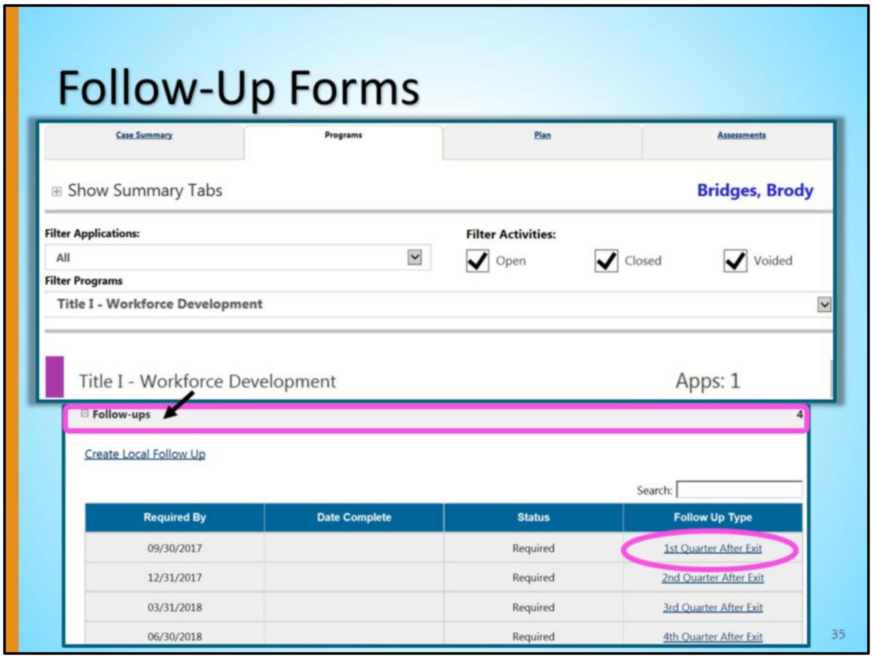


The F-Code will populate in the Activity table as a Follow-up service. To close the activity, follow the same steps as closing out a regular activity.



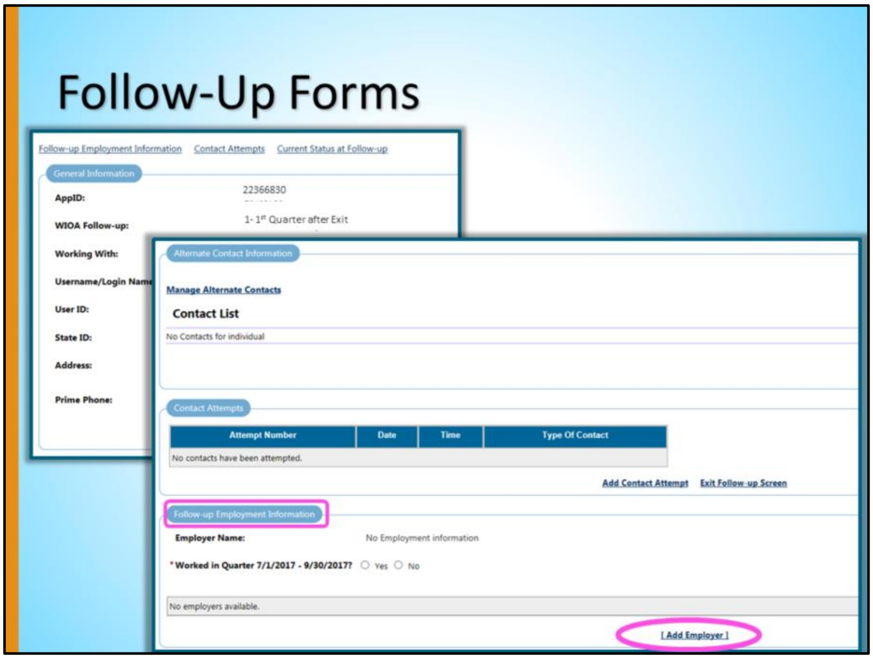
Follow-up is intended to support the participant in retaining employment and continuing to improve their employment success after exit.

In CalJOBS, the system generates a follow-up table with follow-up forms for 4 quarters after exit. This table does not populate until after the 90th day after exit. If the closure tab was utilized, data from that tab may pull over into the follow-up forms.



Within the Title I program application, there is a ribbon titled "Follow-ups". This section is for entering follow up information, including employment information.

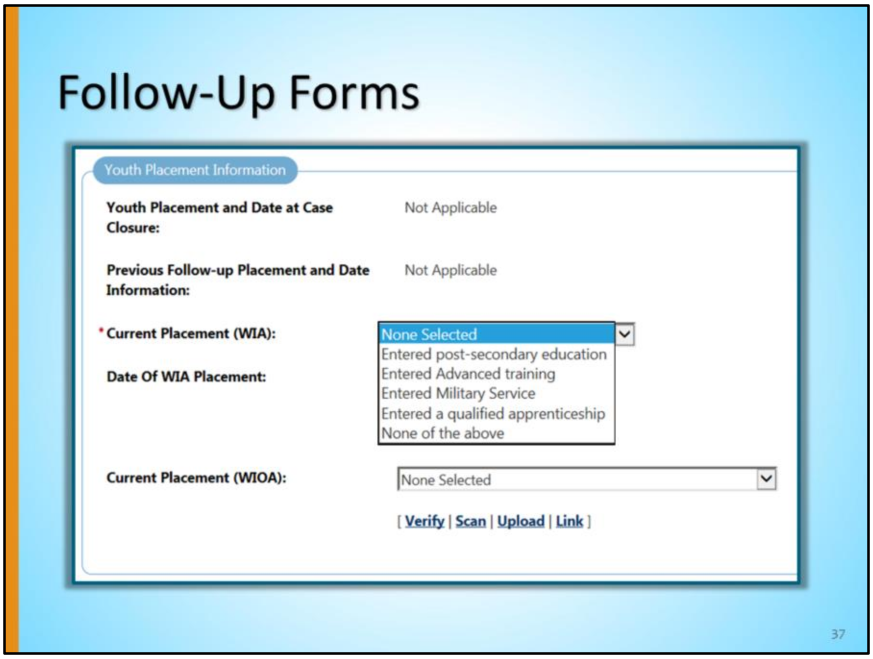
To enter follow-up information, select the link in the "Follow Up Type" column for the quarter you would like to enter follow-up information.



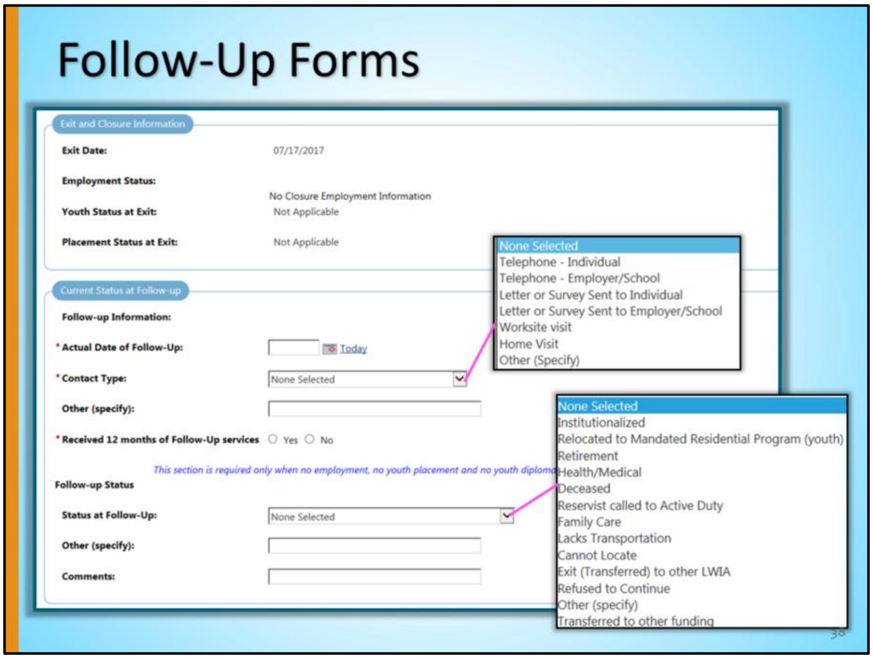
The first section, General Information, populates with system information. **Alternate Contact Information** and **Contact Attempts** can be recorded in the corresponding sections, if desired.

In the **Follow-Up Employment Information** section, if you had previously entered employment information in the closure tab, that information would populate in the **Employer Name** field. If the individual was still working for that employer in the quarter defined in the **Worked in Quarter?** question, there is no need to add employer information.

If employment information was not entered into the closure tab, because the individual was not working at the time of the closure or if staff did not complete the closure tab, you will see a message in the **Employer Name** section, “No Employment information”. If you answer “Yes” to the **Worked in Quarter?** Question, employment information needs to be entered by using the <u>Add Employer</u> link. The employer entry screen is the same screen as the one in the closure tab.



Next, if your individual is a Youth, you will encounter the **Youth Placement Information** section. Complete the Current Placement (WIA) field by selecting the appropriate answer from the drop-down.

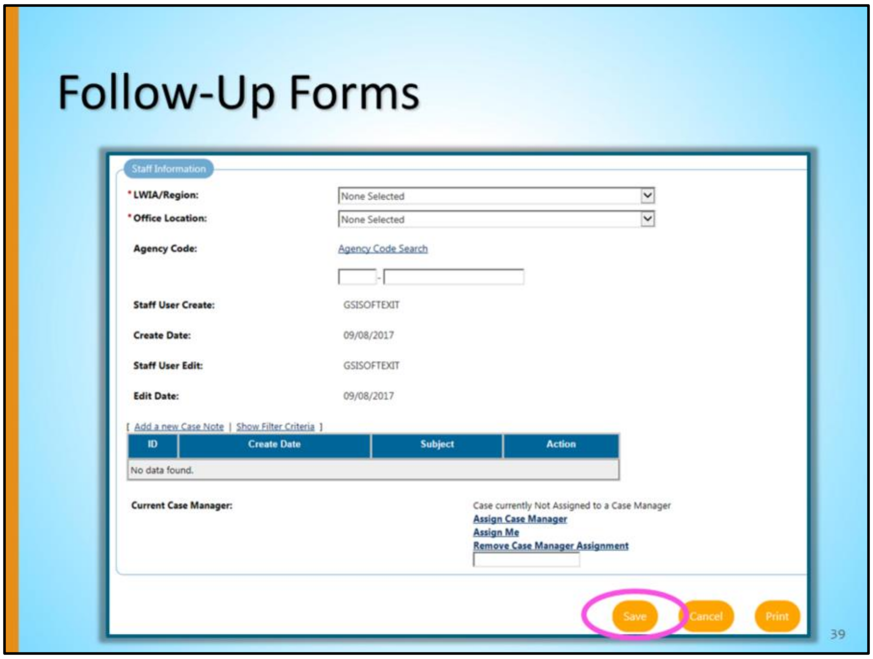


If your individual is not a Youth, the next section you will see if the **Exit and Closure Information** section. This information is system generated.

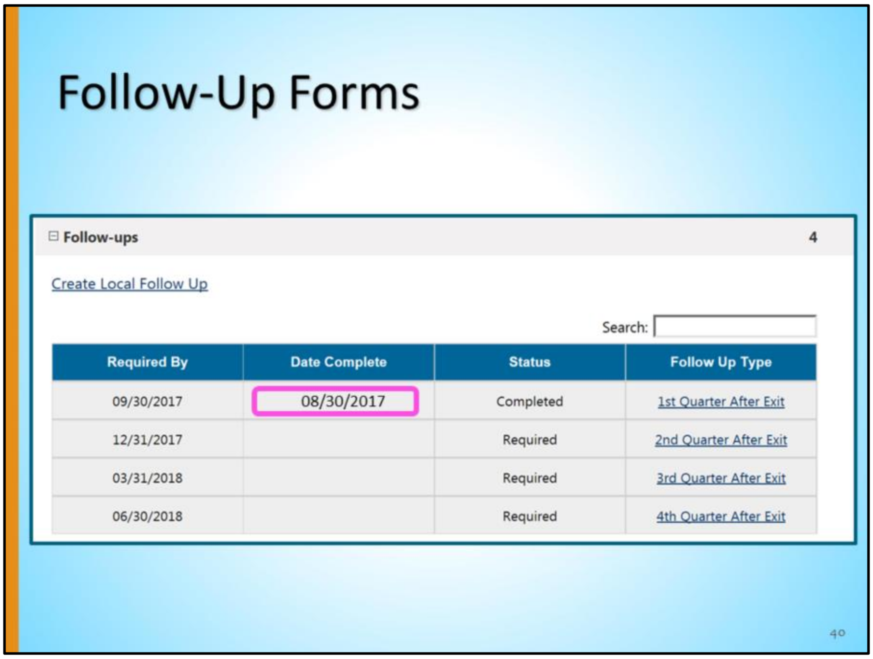
In the Current Status at Follow-up section, complete the required fields. Enter the date of the follow-up in the **Actual Date of Follow-up** field and select the appropriate **Contact Type**. You can choose from a variety of options, shown on this slide.

Next, you may need to answer the mandatory question, **Received 12 months of Follow-up services**.

As noted by the blue text, the following fields are only required when no employment, no youth placement and no youth diploma/credential is recorded on this screen. If that is the case, answer the **Status at Follow-Up** question with one of the many options.



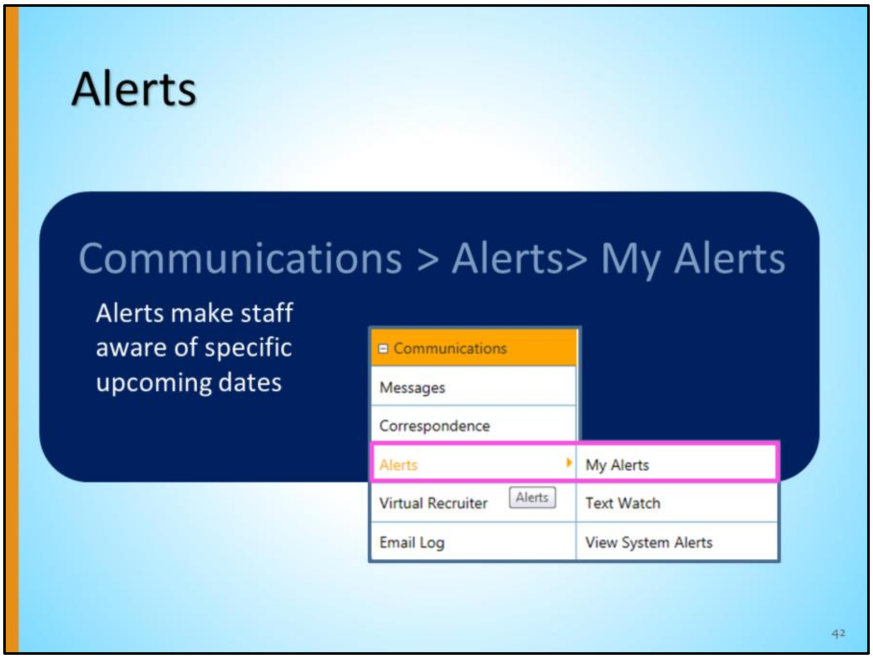
Finally, ensure the LWIA/Region and Office Location fields are complete, and answer any remaining fields, if desired. Select the “Save” button to finish the follow-up entry.



The completed follow-up will now appear within the table on the **Follow-ups** ribbon, noted by the date it was complete. To edit the follow-up, select the corresponding link in the “Follow Up Type” column.

System Alerts

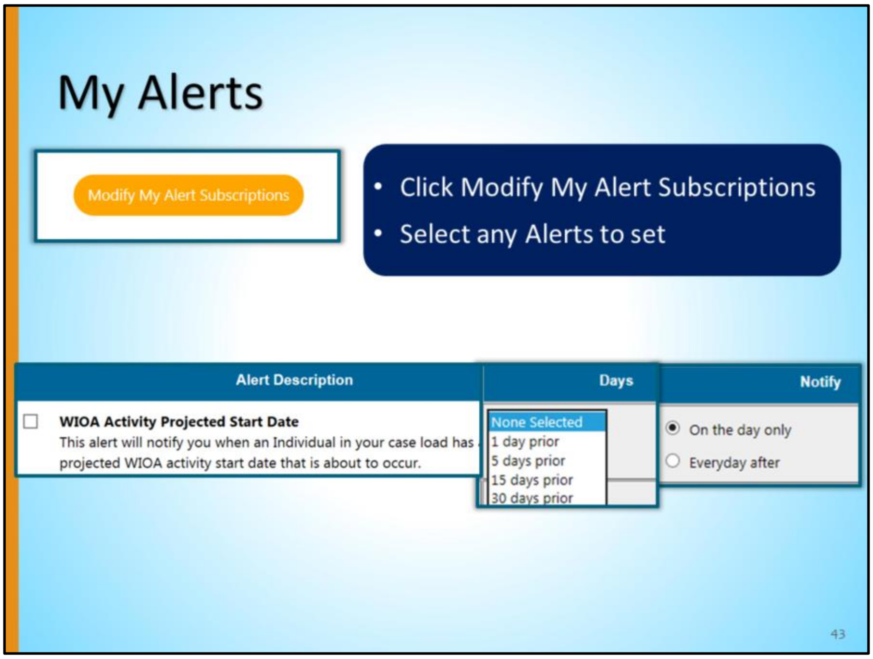
41



Alerts are a helpful feature for case managers.

From the **Communications** left navigation menu, hover over **Alerts**.

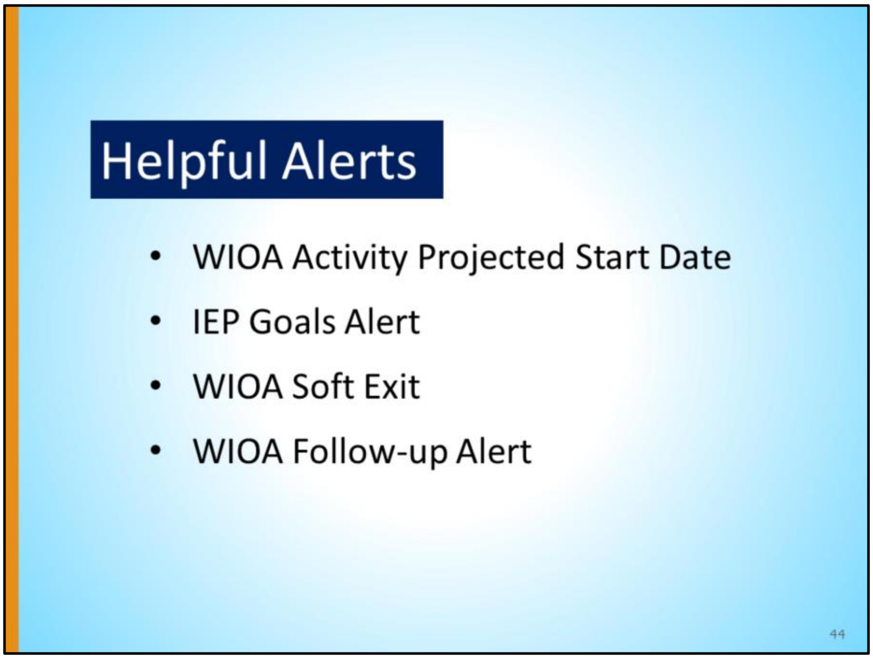
Select **My Alerts** from the fly-out menu.



Click **Modify My Alert Subscriptions** and select which **alerts** from the list you would like to set.
Alerts are listed by category: Individual Registrant, Job Order Alerts, Eligible Training Provider, Wagner-Peyser, WIOA (Title I), Trade Adjustment Assistance, Generic Program, Miscellaneous, IEP, and Employer Profile alerts. Shown here is the **Job Orders about to Expire** alert.

Select the timing for when the alert should run by making a selection from the drop-down list in the **Days** column. The options in this list vary depending on the type of alert subscription being run.

Then, make a selection in the **Notify** column to choose how frequently the system will alert you for a subscription, if applicable. The system can alert you *On the day only* that an alert would be valid (i.e. on the exact day job order's expiration). The system can also notify you on that day and *Everyday after* that the alert is still valid and the issue is outstanding.



These alerts may be helpful, but you will want to review the entire list to choose which alerts you want to run.

Workforce Innovation and Opportunity Act (WIOA) Alerts

	Alert Description	Days	Notify
☑	**WIOA Activity Projected Start Date** This alert will notify you when an Individual in your case load has a projected WIOA activity start date that is about to occur.	1 day prior	○ On the day only ● Everyday after
☐	**WIOA Activity Projected End Date** This alert will notify you when an Individual in your case load has a projected WIOA activity end date that is about to occur.	None Selected	● On the day only ○ Everyday after
☐	**WIOA Soft Exit** This alert will notify you when an Individual in your case load is about to soft exit from the WIOA program.	None Selected	● On the day only ○ Everyday after
☐	**WIOA Male Participants about to turn 18** This alert will notify you when an Individual in your case load is about to turn 18 years of age.	None Selected	● On the day only ○ Everyday after
☐	**WIOA Younger Youth Goals About to Expire** This alert will notify you when an Individual with Youth Goals is about to expire where the status is set but attainment is pending.	None Selected	● On the day only ○ Everyday after
☐	**WIOA Participants expiring work authorization** This alert will notify you when an Individual in your case load whose authorization to work is about to expire.	None Selected	● On the day only ○ Everyday after
☐	**WIOA Followup Alert** This alert will notify you when an Individual in your case load has a follow-up date that is nearing.	None Selected	● On the day only ○ Everyday after
☐	**WIOA Literacy Numeracy Pre-Test has not been posted** This alert will notify you when a Youth is enrolled that meets the requirement for literacy numeracy testing has not had a pre-test posted within 60 days of their first youth service date.	None Selected	● On the day only ○ Everyday after
☐	**WIOA Pre-Applications Pending** This alert will notify you of pending WIOA Pre-Applications that are completed by individuals.	N/A	N/A
☐	**WIOA Literacy Numeracy Post-Test has not been posted** The following individual(s) in your case load who have Literacy Numeracy Pre-tests approaching their anniversary date in XX days XX (From Number of Days (e.g. 15)) as of SYSTEM DATE. You should update the literacy numeracy records appropriately.	None Selected	● On the day only ○ Everyday after
☐	**Individual # of Days Since Last Workforce Innovation Opportunity Act (WIOA) Activity** This alert will notify you when an Individual in your case load has not generated any new WIOA activity since the number of days specified.	None Selected	● On the day only ○ Everyday after

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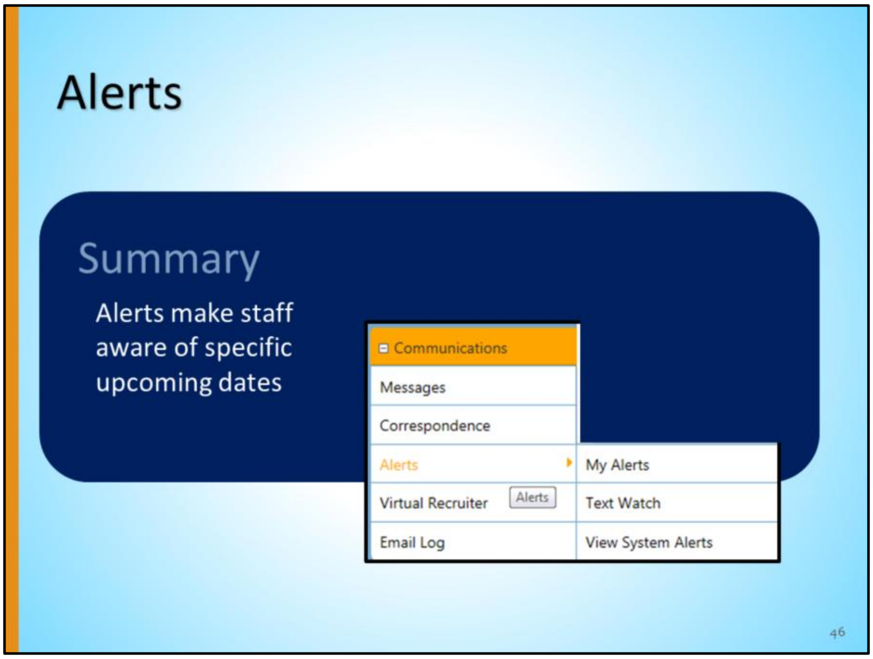
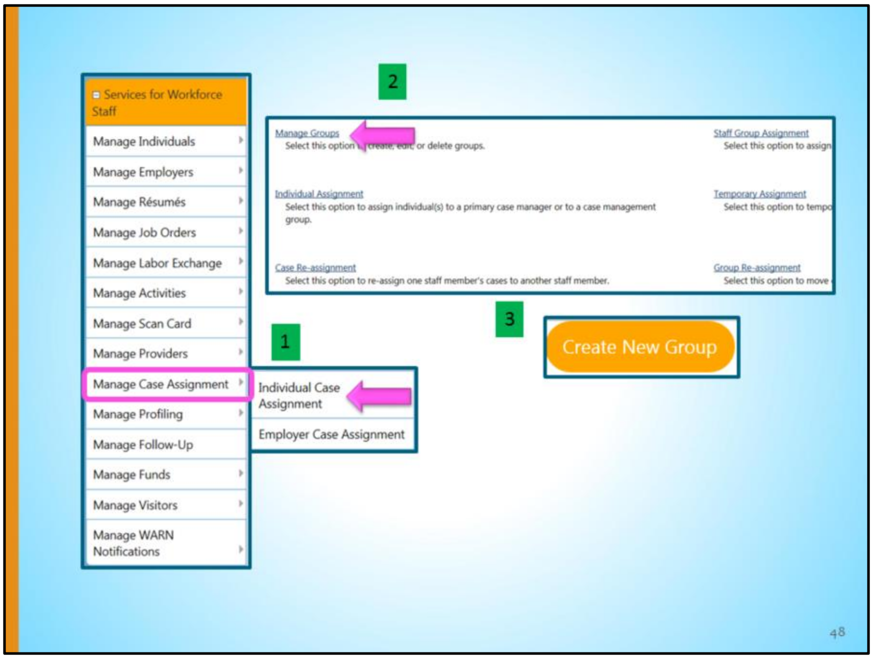


Alerts are a helpful feature for case managers. Choose any alerts that are beneficial for you.

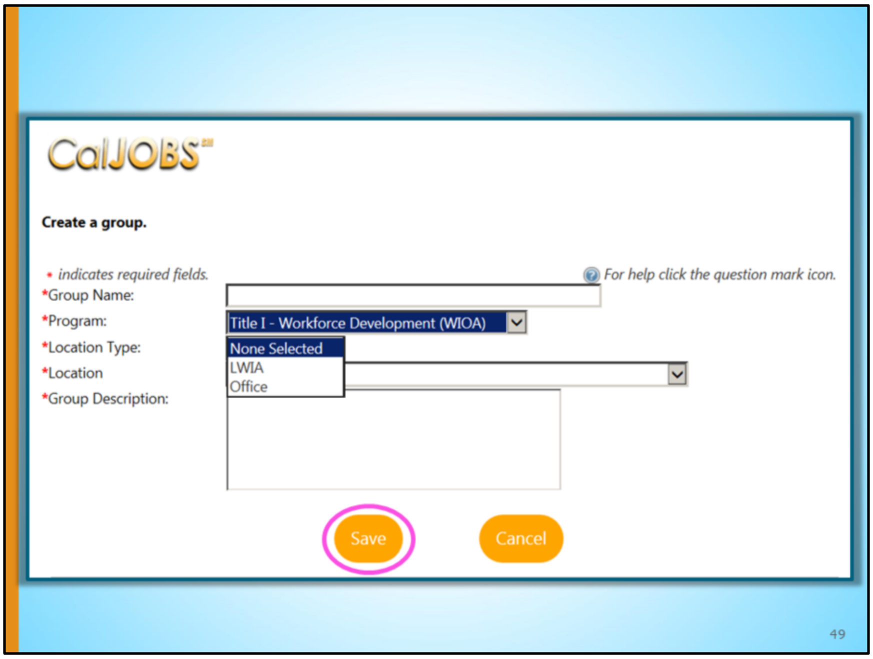
Access Note: In order to use Alerts, you must have Case Management Groups created for your office. This is because the language of the alerts reads: “notify when an individual in your case load…”. You must assign yourself as the case manager of the individual in the program application to add them to your case load.

As mentioned in the previous slide, in order to use Alerts, you must have Case Management Groups created for your office. For Local Areas, Case Management Groups can be created by MIS Administrators. For Non-Local Areas (or Community Based Organizations), any staff member should have access to create Case Management Groups.



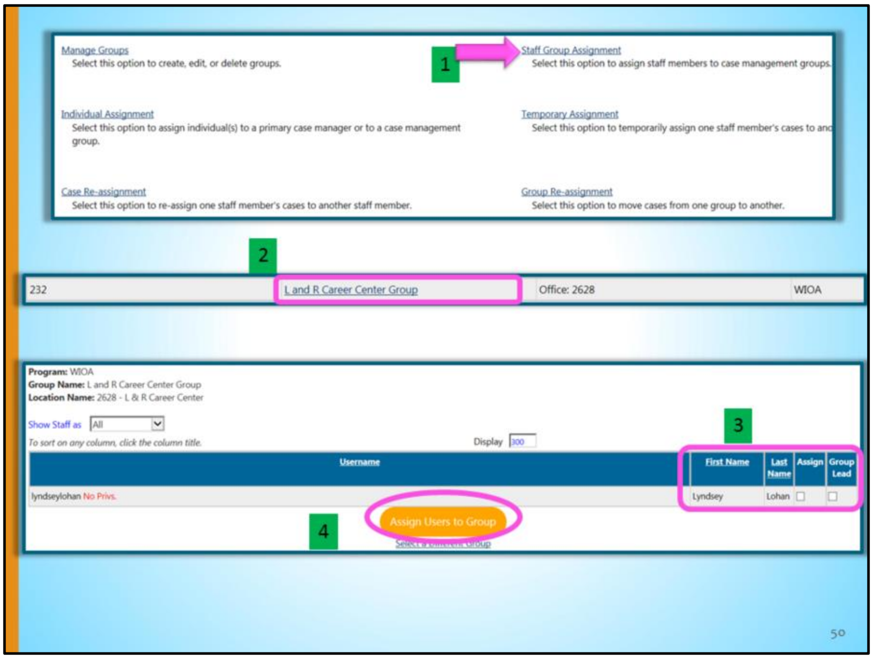
Case management groups are required if organizations would like to be able to assign a case manager to an individual.

First, we must create a group by following the steps in this slide.



Next, complete the required fields and select the “Save” button. You will notice that a couple of the fields shown will not populate on the first screen, but will populate after you answer the **Group Name** and **Program** fields.

After selecting “Save” you will be routed back to the list of existing groups.



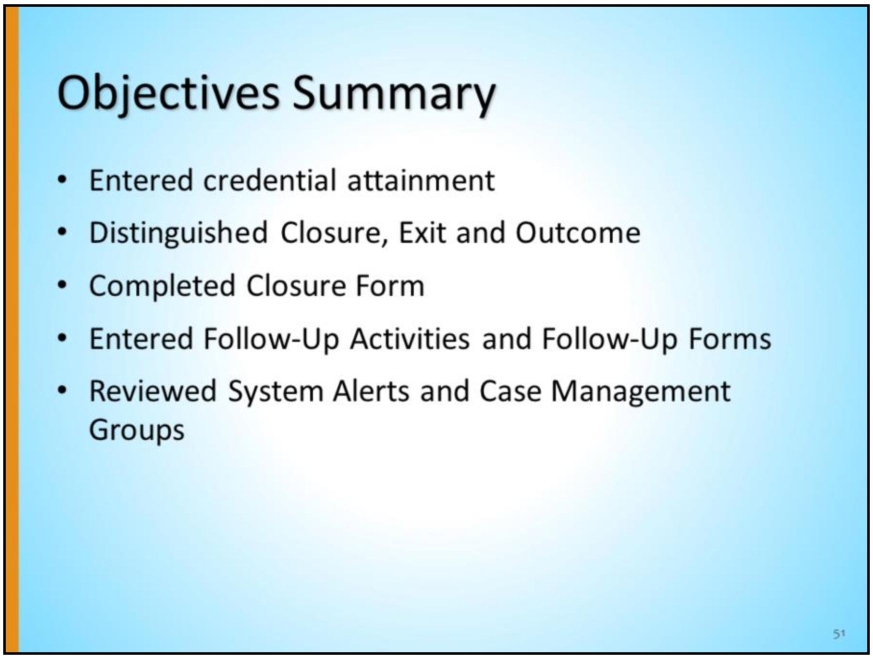
Next, we will choose the staff members we would like associated with the group.

First, select the <u>Staff Group Assignment</u> link from the **Individual Case Assignment** screen.

Second, from the table, find the group you just created and select the name of the group. It may be located at the bottom of the list. For more results, increase the "Display" box to a higher number (999 max).

Third, you will see a list of staff members associated with the LWIA and/or Office Location of your group. Select the staff members you would like to assign to the group in the right side of the columns . **Note:** you must assign a "Group Lead" for your group.

Finally, select the "Assign Users to Group" button. Staff will now be able to assign themselves as a case manager for individuals.



In this training, we:

- Entered credential attainment
- Distinguished Closure, Exit, and Outcome
- Completed Closure form
- Entered Follow-Up Activities and Follow-Up Forms
- Reviewed System Alerts and Case Management Groups